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**E-RATE TECHNOLOGY PLAN  
SELF-ASSESSMENT RUBRIC FOR DISTRICTS**  
**For districts to utilize as they self-assess and update existing plans.**  
(E-RATE PLANS MAY NOT BE APPLICABLE TO OTHER TECHNOLOGY PROGRAMS)

**School District:**

**County:**

**LE:**

**School Years Covered by the Technology Plan (example, 2004-2007)** \_\_\_\_\_

**Web Site Address for Technology Plan** \_\_\_\_\_

Successful technology plans align the overall education improvement objectives with the following criteria. To qualify as an approved Technology Plan for a Universal Service Program discount, the plan must meet the criteria. It is critical that technology planning not be viewed or treated as a separate exercise dealing primarily with hardware and telecommunications infrastructure. There must be connections between the proposed physical infrastructure of the information technology and the plan for professional development, curriculum reform, and library service improvements. Technology plans may be approved for up to three years for funding under the E-Rate program. The Schools and Libraries Division (SLD) of the Universal Services Administrative Company, which is overseen by the Federal Communications Commission, administers the E-Rate program.

For E-Rate program information: <http://www.sl.universalservice.org/> and/or <http://www.opi.state.mt.us/ERate2.html>

**Rubric Scoring:**

0 – Information is missing for the criteria. 1 – Information is incomplete for the criteria. 2 – Information provided meets or exceeds the criteria.

TECHNOLOGY PLAN CRITERIA	PAGE NUMBER REFERENCES	RATING/COMMENTS
<p><b><u>Clear Goals and a Realistic Strategy for using Telecommunications</u></b> The plan establishes <b>clear goals</b> and a realistic strategy for using telecommunications and information technology to improve education or library services.</p> <p><b><u>Minimum Criteria</u></b></p> <ul style="list-style-type: none"> <li>✓ Clear technology/education goals are articulated for the use of technology to improve education,</li> <li>✓ A realistic strategy is designed and implemented for meeting the goals to improve education, and</li> <li>✓ Goals are articulated for the current and each future year that the plan covers. Plans may be approved for up to three years for funding under the E-Rate program.</li> </ul> <p><b><u>Best Practice Recommendations</u></b></p> <ul style="list-style-type: none"> <li>✓ District technology goals are aligned with the district's Five-Year Comprehensive Education Plan and other school improvement goals.</li> </ul>	<p>List the page numbers from the district technology plan where the information for the specific criteria can be found.</p> <p>See Page(s): _____</p> <p>See Page(s): _____</p> <p>See Page(s): _____</p> <p>See Page(s): _____</p>	<p>0      1      2</p>



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<p><b><u>Professional Development Strategy</u></b>  The plan has a <b>professional development strategy</b> to ensure that staff knows how to use the new technologies to improve education or library services.</p> <p><b><u>Minimum Criteria</u></b></p> <ul style="list-style-type: none"> <li>✓ Professional development strategy includes information such as district professional development opportunities planned, professional development available locally (through local/regional providers) and/or participation in curriculum, technology or professional development consortiums, and</li> <li>✓ Professional development strategy is articulated for the current and each future year that the plan covers. Plans may be approved for up to three years for funding under the E-Rate program.</li> </ul> <p><b><u>Best Practice Recommendations</u></b></p> <ul style="list-style-type: none"> <li>✓ Data utilized to determine professional development topics, and</li> <li>✓ Assessment methods to determine effectiveness of professional development experiences are included.</li> </ul>	<p>List the page numbers from the district technology plan where the information for the specific criteria can be found.</p> <p>See Page(s): _____</p> <p>See Page(s): _____</p> <p>See Page(s): _____</p> <p>See Page(s): _____</p>	<p>0      1      2</p>
<p><b><u>Assessment of Telecommunication, Hardware, Software and Other Services</u></b>  The plan includes an assessment of the <b>telecommunication services, hardware, software and other services</b> that will be needed to improve education or library services.</p> <p><b><u>Minimum Criteria</u></b></p> <ul style="list-style-type: none"> <li>✓ Hardware, software and other services are included in a district assessment of telecommunication services needed to improve education,</li> <li>✓ Services such as professional development, wiring and technical support needed are included, and</li> <li>✓ Assessment of services needed is articulated for the current and each future year that the plan covers. Plans may be approved for up to three years for funding under the E-Rate program.</li> </ul> <p><b><u>Best Practice Recommendation</u></b></p> <ul style="list-style-type: none"> <li>✓ Assessment of services needed is clearly linked to the district's technology and education goals.</li> </ul>	<p>List the page numbers from the district technology plan where the information for the specific criteria can be found.</p> <p>See Page(s): _____</p> <p>See Page(s): _____</p> <p>See Page(s): _____</p> <p>See Page(s): _____</p>	<p>0      1      2</p>



<p><b><u>Sufficient Budget</u></b>  The plan provides for a <b>sufficient budget</b> to acquire and support the non-discounted elements of the plan: the hardware, software, professional development, and other services that will be needed to implement the strategies.</p> <p><b><u>Minimum Criteria</u></b></p> <ul style="list-style-type: none"> <li>✓ District articulated local budget, including funds from all sources, that will provide the necessary support for the services included in the technology plan including the district portion of the discounted services requested under the E-Rate program is included, and</li> <li>✓ Budget is articulated for the current and each future year that the plan covers. Plans may be approved for up to three years for funding under the E-Rate program.</li> </ul>	<p>List the page numbers from the district technology plan where the information for the specific criteria can be found.</p> <p>See Page(s): _____</p> <p>See Page(s): _____</p>	<p>0      1      2</p>
<p><b><u>Evaluation Process</u></b>  The plan includes an <b>evaluation process</b> that enables the school or library to monitor progress toward the specified goals and make mid-course corrections in response to new developments and opportunities as they arise.</p> <p><b><u>Minimum Criteria</u></b></p> <ul style="list-style-type: none"> <li>✓ Process must include information on the evaluation process, such as, who reviews the plan (technology committee, school board, etc.), how often the plan is reviewed, the information that is utilized to review the plan and the reviewer's ability to make changes to the plan as needed.</li> </ul>	<p>List the page numbers from the district technology plan where the information for the specific criteria can be found.</p> <p>See Page(s): _____</p>	<p>0      1      2</p>
<p><b>To be approved, a plan must provide information that meets or exceeds the criteria listed above (Score of two).</b></p>		

